



CALTRANS SOQ DOCUMENT PREPARATION

Central Region CalMentor

1

The Ask.

2

The Answer.

3

The Report Card.

MODULE OUTLINE

THE ASK



RFQ/RFI



SOQ SUBMITTAL
INSTRUCTIONS



SOQ RESPONSIVENESS
CHECKLIST

REQUEST FOR QUALIFICATIONS (RFQ)/REQUEST FOR INFORMATION (RFI)

- RFQ:

Caltrans document

Contains all the contract specific details like dates (due date, interview date, negotiation period), term, escalation, scope and WBS, personnel requirements, funding, project types, DBE or DVBE %, etc.

- RFI:

Request from prime

Contains specifics for what is needed from teammates.

Templates

Cal eProcure

Home Resources Quick Links Help Login/Register

Event Search

California State Contracts Register

Event Name Event ID Department Event Status

266 Posted

Clear Criteria Advanced Search Criteria Search

Comments and Attachments

Event ID: 59A1130 Event Name: A&E On-Call Quality Assurance and/or Verification Services

View Attachments

Viewing attachments 1 of 1

Attached File	Attachment Description	Download
RFQ-59A1130.pdf	Performed To Be Performed	

Return

SOQ SUBMITTAL INSTRUCTIONS

- Caltrans document
- Details each required section and contents
- General for ALL contracts
- Important definitions
- Contract requirements
- Always use the version stated in the RFQ

<https://dot.ca.gov/programs/procurement-and-contracts/ae-contract-information/procuring-a-e-contracts>

Procuring A&E Contracts

Effective July 1, 2019, in accordance with [Section 508 of the Rehabilitation Act](#), Caltrans launched an improved website to deliver enhanced digital accessibility. To meet electronic and information technology standards, some documents may no longer be available for download.

For inquiries related to page content or available documents contact [A&E Customer Service](#).

Consultant Selection

Initial Evaluation

- [SOQ Initial Evaluation \(ADM-2027A\)](#)
- [SOQ Initial Evaluation - Strengths and Weaknesses \(ADM-2027B\)](#)

Correspondence

- [Sample Notice of Shortlisted Results Letter \(PDF\)](#)
- [Sample Interview Letter with Instructions \(PDF\)](#)
- [Sample Final Ranking Letter \(PDF\)](#)

Final Evaluation

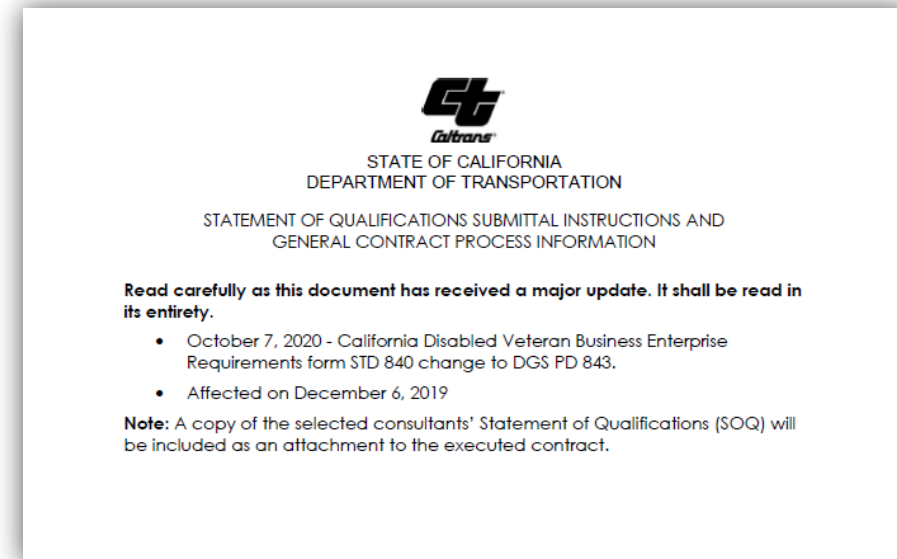
- [Consultant Evaluation Form Presentation and Interview \(ADM-2028A\)](#)
- [Consultant Evaluation Form Presentation and Interview - Strengths and Weaknesses \(ADM-2028B\)](#)
- [Final Evaluation - Consensus \(ADM-2028C\)](#)

General

- [Request for Qualifications - Current Process \(PDF\)](#)

Statement of Qualifications (SOQ)

- [SOQ Submittal Instructions - Current Process \(PDF\)](#)
- [SOQ Submittal Instructions - Process Until 04/15/19 \(PDF\)](#)
- [SOQ Responsiveness Checklist \(PDF\)](#)



SOQ RESPONSIVENESS CHECKLIST

- Caltrans document
- General for ALL Contracts

[Rehabilitation Act](#), Caltrans launched an improved website to deliver enhanced technology standards, some documents may no longer be available for download.

Contact [A&E Customer Service](#).

General

- [Request for Qualifications - Current Process \(PDF\)](#)

Statement of Qualifications (SOQ)

- [SOQ Submittal Instructions - Current Process \(PDF\)](#)
- [SOQ Submittal Instructions - Process Until 04/15/19 \(PDF\)](#)
- [SOQ Responsiveness Checklist \(PDF\)](#)

A&E CONSULTANT'S SOQ RESPONSIVENESS CHECKLIST

The following checklist is provided as a tool to assist Consultants responding to a Request for Qualifications (RFQ) Notice. Solicitations may differ in their requirements; therefore, please read each solicitation carefully to ensure responsiveness. Also refer to "Statement of Qualifications Submittal Instructions and General Contract Process Information."

- Received by submittal date and time
- Required number of copies submitted to each location specified
- SOQ includes the following seven (7) sections:

Section 1 – Transmittal Letters

- Prime Consultant
- Subconsultant(s) and/or vendor(s)

Goal Documentation (unless DBE or DVBE goal is exempt)

- Disadvantaged Business Enterprise (DBE) Goals
 - Disadvantaged Business Enterprise (DBE) Information for A&E Contracts, ADM-0227F A&E
 - Bidder/Proposer Disadvantaged Business Enterprise (DBE) Good Faith Efforts Documentation, ADM-0312F
- Disabled Veteran Business Enterprise (DVBE) Goals
 - Disabled Veteran Business Enterprise Declarations, DGS PD 843
 - Bidder Declaration, GSPD-05-105

Consultant/Contractor Registration Program - Only for contracts containing public work elements subject to prevailing wage requirements.

Section 2 – General Services Administration Standard Form SF330

Part One: Contract Specific Qualifications

- Contract Information
- Architect-Engineer Point of Contact – Prime Information
- Proposed Team
- Organizational Chart
- Resumes of Proposed Key Personnel listed on organizational chart (and Required Licenses/Certifications)
- Example Projects
- Key Personnel Participation in Example Projects
- Additional Information
- Authorized Representative

Part Two: General Qualifications – Not Required

Section 3 – Staff Availability Table or Graph/Personnel Retention Plan

Section 4 – Communication Plan

Revised 02/25/20

A&E CONSULTANT'S SOQ RESPONSIVENESS CHECKLIST

Section 5 – Work Force Analysis (50 or more employees) **OR Exemption Statement** (< 50 employees)

Section 6 – Nondiscrimination Statement (50 or more employees) **OR Exemption Statement** (< 50 employees)

Section 7 – California Civil Rights Laws Certification

<https://dot.ca.gov/programs/procurement-and-contracts/ae-contract-information/procuring-a-e-contracts>



QUESTIONS

Section I

THE ANSWER



BUILDING YOUR
COMPLIANT TEAM



SOQ CONTENTS

BUILDING YOUR COMPLIANT TEAM



CONTRACT MANAGER



KEY PERSONNEL



EXPERIENCE



DBE SUBCONSULTANTS
AND VENDORS

PUTTING TOGETHER THE SOQ

- Seven tabbed sections
- Comprehensive
- Compliant
- Correct



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This document is interactive. Click on any of the Tabs along the right margin to navigate throughout the document. The above TOC is also hyperlinked.

SECTION I – TRANSMITTAL LETTERS/GOAL DOCUMENTATION



Transmittal Letter (Prime)



Transmittal Letters (Subconsultants/Vendors)



Conflict of Interest Forms (ALL)



Form ADM-0227F DBE Participation



Form ADM-0312F: DBE Good Faith Effort Documentation



Consultant/Contractor Registration Program (DIR)

Section 1

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Transmittal Letter (Prime)

- Specific statements and information required
 - List all firms, their services, and estimated % utilization and whether they're subject to prevailing wage or not
 - Certification statement for minimum qualifications
 - Conflict of interest disclosure
 - Identify former Caltrans employees listed on org
 - Contact information for prime
- Make your case, tie in rating criteria, be *compliant*
- State contract manager experience and meeting minimum qualifications
- Signature constitutes certain certifications (read SOQ Submittal Instructions)
- Page limit: 4

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Transmittal Letter (Subconsultants/Vendors)

- Specific statements and information required
 - Commitment to prime
 - List specific services to be provided
 - Certification statement for minimum qualifications
 - Conflict of interest disclosure
 - Identify Former Caltrans employees listed on org
- Suggest including DBE and DIR/Prevailing Wage information
- Signature constitutes certain certifications (read SOQ Submittal Instructions)
- Page limit: 1

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Conflict of Interest Forms

- Required from Prime and Subs
- Recommended even if no conflicts
- Placement here is recommended
- Always check web site for current version
- Complete all areas and sign

DISCLOSURE OF POTENTIAL CONFLICT OF INTEREST FORM FOR A&E CONTRACTS

The PROPOSER must identify and describe in detail each conflict of interest.

Use one form for each firm and attach additional documentation as necessary.

- I. Describe in detail the nature of the actual or potential conflict(s) (involving project, personnel, financial advantage, or another item):
 - a) project,
 - b) personnel,
 - c) financial advantage, or
 - d) another item
- II. For **each** actual or potential conflict above, describe in detail the **measures proposed to mitigate each issue.**
- III. Describe in detail the intended effect of the proposed measures on the actual or potential conflict(s) and how the proposed measures will mitigate the actual or potential conflict(s):

Signature _____ Date _____

Provide name and phone number for a contact person that is authorized to discuss this disclosure form with the Department of Transportation contract personnel.

Name & Title _____ Phone _____

Solicitation # _____ Firm Name _____

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Form ADM-03 I2F: DBE Good Faith Effort Documentation

- Recommended even if you've met the goal
- DBE Database Printouts
- Copies of advertisements/solicitations
- Copies of responses from all firms accepting or declining

STATE OF CALIFORNIA - DEPARTMENT OF TRANSPORTATION
BIDDER/PROPOSER DISADVANTAGED BUSINESS ENTERPRISE (DBE) GOOD FAITH EFFORTS DOCUMENTATION
 ADM-0312F (REV. 12/2013) (Page 1 of 4) (CONTRACTS FEDERALLY FUNDED IN WHOLE OR IN PART)

CONTRACTORS NAME: _____ FIB OR RFP OR RFQ NUMBER: _____ DATE: _____ Lock Data on Form

BIDDER/PROPOSER INSTRUCTIONS: Submitter of only the Disadvantaged Business Enterprise (DBE) Information form, ADM-0227F, may not provide sufficient documentation to demonstrate that adequate good faith efforts (GFE) were made by the bidder/proposer. Bidder/proposers proposing goal attainment should always submit documentation for making GFE to protect its eligibility for award should Caltrans, in its evaluation, find that the goal was not met. Examples of disqualification may include, but are not limited to: 1) A DBE subcontractor was not certified by Caltrans or a state or local participating agency that has a reciprocal agreement with Caltrans, by the bid/proposal due date and time; or 2) Bidder/proposer made a mathematical error resulting in failure to meet the goal. Bidder/Proposer must make all appropriate GFE to be responsive. When applying for a determination of a GFE where no contract goals have been attained or when only partial goals have been attained, bidder/proposers shall complete this Bidder/Proposer, DBE Good Faith Effort Documentation form, ADM-0312F, and submit the requested information before the bid due date and time. Bidder/Proposer is responsible to: (1) ensure information is complete and accurate, and (2) verify DBE certifications.

1. ADVERTISEMENT DOCUMENTATION
 List names and dates of each general circulation newspaper, trade paper and minority focused paper or other publication in which a request for DBE participation was placed. Attach a copy of the advertisements or proof of publication.

TITLE OF PUBLICATION	PUBLICATION DATES	TITLE OF PUBLICATION	PUBLICATION DATES

2. DBE DOCUMENTATION
 a. List the names and dates of written notices sent to DBE firm certified as DBEs soliciting bids for the contract.
 b. List the dates and methods used for following up initial solicitations to determine with certainty whether or not the DBEs were interested.
 c. Attach a copy of any solicitation package, phone records, fax confirmations or solicitation follow-up correspondence sent to DBE firms.
 d. Identify information submitted to the bidders for the solicitation.

Check the appropriate box: FIB RFP RFQ

SOLICITATION DATE MAILED	DATE PHONED	DATE OF FOLLOWUP	FOLLOWUP METHOD (PHONE/FAX)	NAME OF FIRM SOLICITED	CONTACT NAME	PHONE NUMBER

STATE OF CALIFORNIA - DEPARTMENT OF TRANSPORTATION
BIDDER/PROPOSER DISADVANTAGED BUSINESS ENTERPRISE (DBE) GOOD FAITH EFFORTS DOCUMENTATION
 ADM-0312F (REV. 12/2013) (Page 3 of 4) (CONTRACTS FEDERALLY FUNDED IN WHOLE OR IN PART)

CONTRACTORS NAME: _____ FIB OR RFP OR RFQ NUMBER: _____ DATE: _____

4. DBE RESPONSES
 List the DBE firms that responded or submitted bid/proposals to your solicitation for participation in this contract that were not accepted. Provide a summary of your discussions and negotiations with each. The name of the firm selected for that portion of work, and the reasons for your choice. Attach copies of quotes from DBE firms contacted.

DBE FIRM NAME	PHONE NUMBER	RESPONDED		SELECTED		GIVE REASON FOR NON-SELECTION AND A SUMMARY OF DISCUSSIONS
		YES	NO	YES	NO	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

5. ASSISTANCE TO DBEs - Bonding, Insurance, etc.
 Identify efforts to assist DBEs in obtaining bonding, lines of credit, insurance, and/or any technical assistance related to requirements for the work or for plans and specification provided to DBEs.

STATE OF CALIFORNIA - DEPARTMENT OF TRANSPORTATION
BIDDER/PROPOSER DISADVANTAGED BUSINESS ENTERPRISE (DBE) GOOD FAITH EFFORTS DOCUMENTATION
 ADM-0312F (REV. 12/2013) (Page 2 of 4) (CONTRACTS FEDERALLY FUNDED IN WHOLE OR IN PART)

CONTRACTORS NAME: _____ FIB OR RFP OR RFQ NUMBER: _____ DATE: _____

2. DBE DOCUMENTATION (Continue)

3. ITEMS OF WORK
 Identify the items of work made available to DBE firms, including, where appropriate, any breakdown of the contract work into economically feasible units to facilitate DBE participation. Bidder/Proposer shall demonstrate that sufficient work to facilitate DBE participation was made available to DBE firms.

DATE MAILED	DATE PHONED	DATE OF FOLLOWUP	FOLLOWUP METHOD (PHONE/FAX)	NAME OF FIRM SOLICITED	CONTACT NAME	PHONE NUMBER

BREAKDOWN OF ITEMS:

STATE OF CALIFORNIA - DEPARTMENT OF TRANSPORTATION
BIDDER/PROPOSER DISADVANTAGED BUSINESS ENTERPRISE (DBE) GOOD FAITH EFFORTS DOCUMENTATION
 ADM-0312F (REV. 12/2013) (Page 4 of 4) (CONTRACTS FEDERALLY FUNDED IN WHOLE OR IN PART)

CONTRACTORS NAME: _____ FIB OR RFP OR RFQ NUMBER: _____ DATE: _____

6. ASSISTANCE TO DBEs - Equipment/Materials, etc.
 Identify efforts made to assist interested DBEs in obtaining necessary equipment, supplies, materials, or related assistance or services excluding supplies and equipment that the DBE subcontractor purchases or leases from the prime contractor or its affiliate.

7. ADDITIONAL DATA
 Provide any additional data to support a demonstration of GFE such as contacts with DBE assistance agencies. Identify the names of agencies, organizations, and groups providing assistance in contacting, recruiting, and using DBE firms. Attach copies of requests to agencies and any responses received, i.e., faxes, internet pages, etc.

NAME OF AGENCY/ORGANIZATION	METHOD/DATE OF CONTACT	RESULTS

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Section 7



Consultant/Contractor Registration Program

- Prime responsibility
- Copy of printouts

State of California
Department of Industrial Relations

Back to DIR-->

Public Works Contractor Registration Search

Enter at least one criteria to display registered public works contractor(s) matching your selections.
Note: Search results will display all of the public works contractor registrations, both current and expired. Make sure a proper registration fiscal year is selected when performing a search.

Input Label: From Date:(mm/dd/yyyy) To Date:(mm/dd/yyyy)

County: City:

Search Results:

Crafts (Select all that apply)

- Asbestos
- Boilermaker-Blacksmith
- Bricklayer/Brick Tender
- Carpenter
- Carpet, Linoleum, Resilient Tile Layer
- Cement Mason
- Consultant
- Driver (On/Off Hauling)
- Drywall Installer/Lather/Finisher

CUCP DATABASE

Old

Disadvantaged Business Enterprise Firm Search

Mon Apr 19 17:03:33 PDT 2021

[DBEO Home](#) [Caltrans Home](#)

Note:

- If using the "Firm Name" for your search criteria and the DBE profile does not display, use the "DBA Name" search criteria to locate a specific firm if the Firm ID is unknown.
- The DBE Certification does not expire. Firms that do not continue to meet the DBE criteria are de-certified and removed from the database.
- **For Bidders:** It is recommended that when making a query to locate certified DBEs for subcontracting opportunities, your search include, at minimum, "Work Categories" and "NAICS Categories."
- To report problems, email DBE.Certification@dot.ca.gov or call (916) 324-1700

• **PLEASE NOTE OUR MAILING ADDRESS CHANGE effective immediately:**
Caltrans - Office of Civil Rights
Certification Branch
PO Box 942874, MS 79
Sacramento, CA 95814

Firm ID

DBA Name

Firm Name

City

Zip Code

Area Code

Caltrans Districts

District 01
 District 02
 District 03
 District 04
 District 05

[View CT District Map](#)

County

Alameda
 Alpine
 Amador
 Butte
 Calaveras

Work Category Codes

A0110 CASH GRAINS
 A0130 FIELD CROPS, EXCEPT CASH GRAINS
 A0160 VEGETABLES & MELONS
 A0170 FRUITS & TREE NUTS
 A0180 HORTICULTURAL SPECIALTIES

[Download Work Category Code List](#)

Certification Types

DBE ACDBE

Majority Owner Gender

Male Female

Race/Ethnicity

Asian Pacific
 Asian Subcontinent
 Black
 Caucasian
 Hispanic

License Type


A General Engineering Contractor
 ARC Architect
 ASB Asbestos
 B General Building Contractor
 C02 Insulation and Acoustical Contractor

NAICS Categories

11 Agriculture, Forestry, Fishing, and Hunting
 21 Mining
 22 Utilities
 23 Construction
 31 Manufacturing

NAICS Codes

New



Disadvantaged Business Enterprise System

[Vendor Log In](#) [Staff Log In](#)

Vendor Certification

Search and/or join our database of certified vendors

[Apply for / Renew Certification](#)

Search Directory of Certified Firms

Search our CUCP database of certified vendors

[Search Directory of CUCP DBE Certified Firms](#)

[Work Code Guide](#)

System Training

Learn how to fully utilize our system with a live trainer

[Training](#)

About the System

Learn more about this system and how it works today

[Information for Vendors](#)

Account Access


Lookup Vendor accounts or reset user passwords

[Account Lookup](#)


[Forgot Password](#)

SECTION 2 – GENERAL SERVICES ADMINISTRATION SF330

PART I CONTRACT SPECIFIC QUALIFICATIONS

 Sections A-C Contract Information, A-E Point of Contact (Prime), Proposed Team


 Section D Organizational Chart

 Section E Resumes

 Section F Example Projects

 Section G Key Personnel Participation in Example Projects

 Section H Additional Information

 Section I Authorized Representative

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Sections A-C Contract Information, A-E Point of Contact (Prime), Proposed Team

- Contract info
- Contract manager info
- Prime locations and subconsultant locations that will be serving this contract

ARCHITECT-ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. TITLE AND LOCATION (City and State)

2. PUBLIC NOTICE DATE

3. SOLICITATION OR PROJECT NUMBER

B. ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE

5. NAME OF FIRM

6. TELEPHONE NUMBER

7. FAX NUMBER


8. E-MAIL ADDRESS

C. PROPOSED TEAM
(Complete this section for the prime contractor and all key subcontractors.)

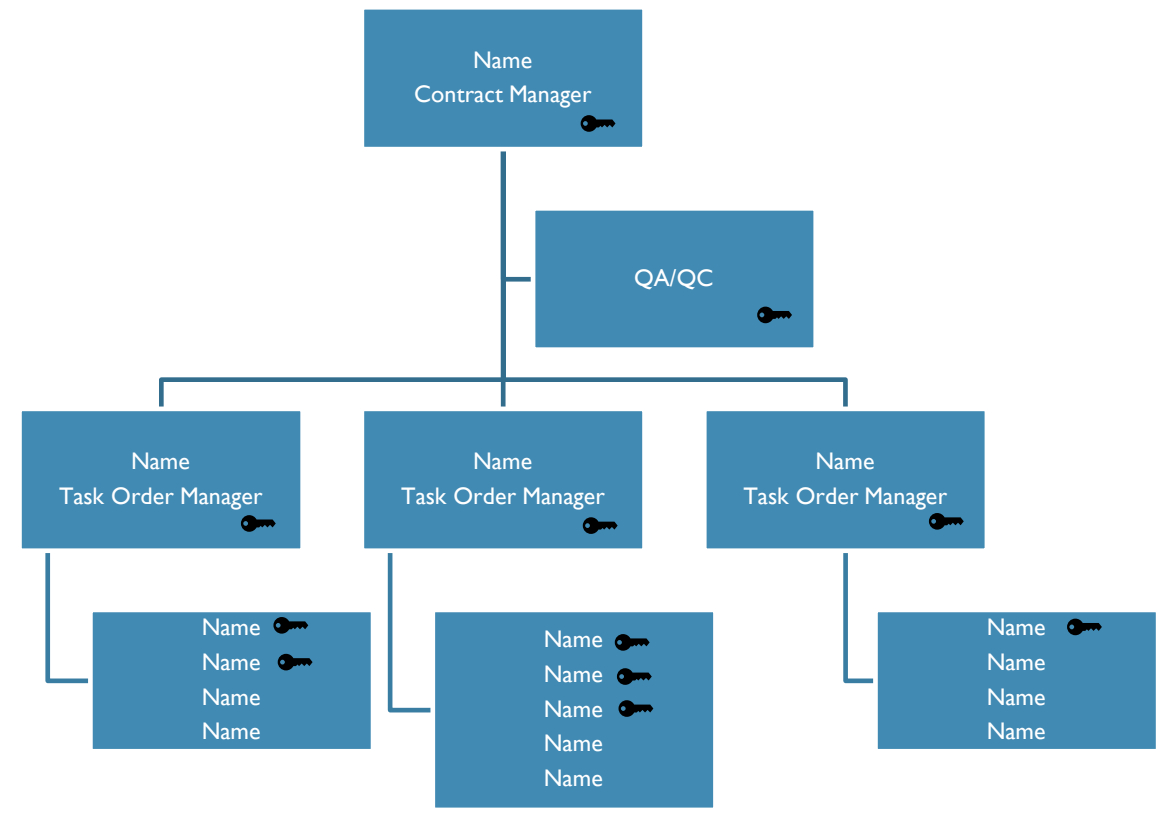
(Check)	PRIME CONTRACTOR	KEY SUBCONSULTANT	9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
a.	<input type="checkbox"/>	<input type="checkbox"/>			
			<input type="checkbox"/> CHECK IF BRANCH OFFICE		
b.	<input type="checkbox"/>	<input type="checkbox"/>			
			<input type="checkbox"/> CHECK IF BRANCH OFFICE		
c.	<input type="checkbox"/>	<input type="checkbox"/>			
			<input type="checkbox"/> CHECK IF BRANCH OFFICE		
d.	<input type="checkbox"/>	<input type="checkbox"/>			
			<input type="checkbox"/> CHECK IF BRANCH OFFICE		
e.	<input type="checkbox"/>	<input type="checkbox"/>			
			<input type="checkbox"/> CHECK IF BRANCH OFFICE		
f.	<input type="checkbox"/>	<input type="checkbox"/>			
			<input type="checkbox"/> CHECK IF BRANCH OFFICE		

D. ORGANIZATIONAL CHART OF PROPOSED TEAM (Attached)

AUTHORIZED FOR LOCAL REPRODUCTION STANDARD FORM 330 (REV. 8/2016)

 Section D Org Chart

- Entire team (Prime and Subs)
- Cover ALL scope areas
- Differentiate KEY personnel
- 1 page limit



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Section E Resumes

- Everyone needs a resume
- Key personnel must be on SF330; non-key consultant's choice
- Organize and number by classification and firm
- Proof of qualifications
- 5 project, 2 page limit

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT (Complete one Section E for each key person.)			
12. NAME		13. ROLE IN THIS CONTRACT	
15. FIRM NAME AND LOCATION (City and State)		14. YEARS EXPERIENCE a. TOTAL b. WITH CURRENT FIRM	
16. EDUCATION (Degree and Specialization)		17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)	
18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)			
19. RELEVANT PROJECTS			
(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION (if applicable)		<input type="checkbox"/> Check if project performed with current firm
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE			
a.			
(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION (if applicable)		<input type="checkbox"/> Check if project performed with current firm
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE			
b.			
(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION (if applicable)		<input type="checkbox"/> Check if project performed with current firm
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE			
c.			
(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION (if applicable)		<input type="checkbox"/> Check if project performed with current firm
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE			
d.			
(1) TITLE AND LOCATION (City and State)	(2) YEAR COMPLETED PROFESSIONAL SERVICES CONSTRUCTION (if applicable)		<input type="checkbox"/> Check if project performed with current firm
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE			
e.			

STANDARD FORM 330 (REV. 8/2016) PAGE 2

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Section F Project Examples

- Match the contract services (transportation)
- State, federal and local examples
- Contract manager involvement
- Key personnel involvement
- Subconsultant involvement
- 1 page per project

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT <i>(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)</i>			20. EXAMPLE PROJECT KEY NUMBER
21. TITLE AND LOCATION (City and State)		22. YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
23. PROJECT OWNER'S INFORMATION			
a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER	
24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT <i>(Include scope, size, and cost)</i>			
25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT			
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE	
a.			
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE	
b.			
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE	
c.			
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE	
d.			
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE	
e.			
(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE	
f.			

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 Section G Key Personnel Participation in Example Projects

- Contract manager involvement
- Key personnel involvement
- Subconsultant involvement

G. KEY PERSONNEL PARTICIPATION IN EXAMPLE PROJECTS											
26. NAMES OF KEY PERSONNEL <i>(From Section E, Block 12)</i>	27. ROLE IN THIS CONTRACT <i>(From Section E, Block 13)</i>	28. EXAMPLE PROJECTS LISTED IN SECTION F <i>(Fill in "Example Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role.)</i>									
		1	2	3	4	5	6	7	8	9	10
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Section 1

Section 2

Section 3

Section 4

Section 5

Section 6

Section 7

 Section H Additional Information

- Prime and Subs
- Firm overview
- What do you bring?
- Differentiate here
- Prime page limit 4; subs 2

H. ADDITIONAL INFORMATION

30. PROVIDE ANY ADDITIONAL INFORMATION REQUESTED BY THE AGENCY. ATTACH ADDITIONAL SHEETS AS NEEDED.

I. AUTHORIZED REPRESENTATIVE
The foregoing is a statement of facts.

<small>31. SIGNATURE</small>	<small>32. DATE</small>
<small>33. NAME AND TITLE</small>	

Section 1

Section 2

Section 3

Section 4

Section 5

Section 6

Section 7

 Section I Authorized Representative

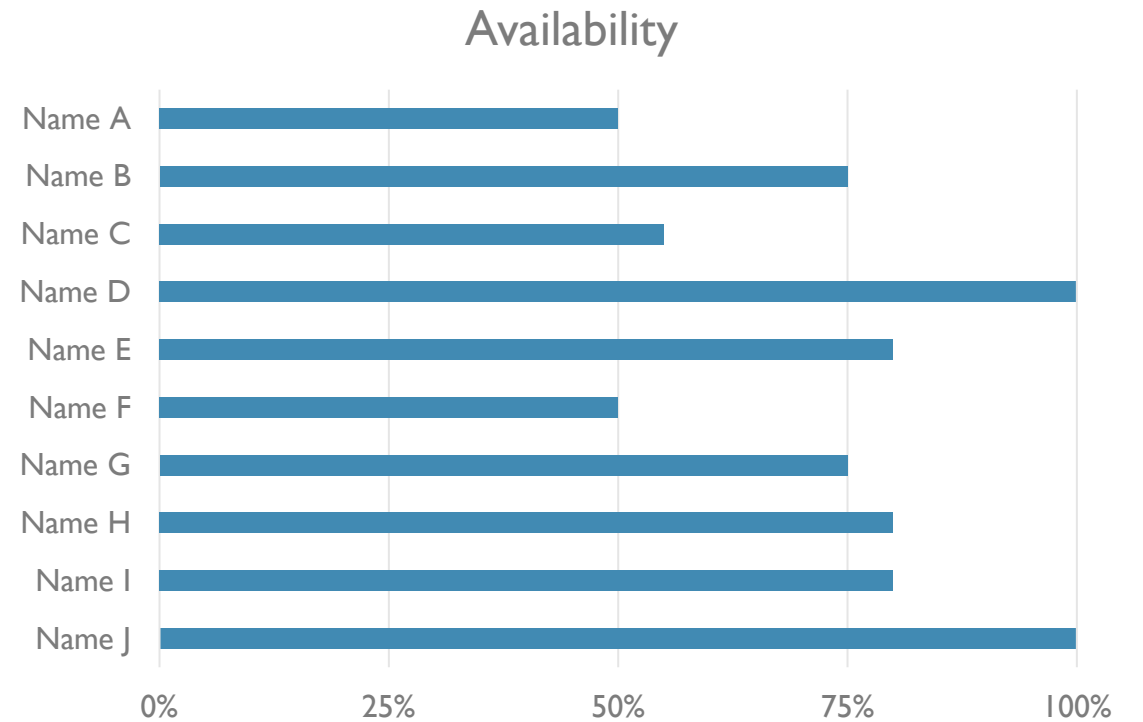
- Required of Prime
- Suggested for Subs

I. AUTHORIZED REPRESENTATIVE <i>The foregoing is a statement of facts.</i>	
31. SIGNATURE	32. DATE
33. NAME AND TITLE	

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SECTION 3 – STAFF AVAILABILITY

- Entire team (Prime and Subs)
- Staff retention plan



SECTION 4 – COMMUNICATION PLAN

- Communication Plan (Prime and Key subs)
- No stated page limit



SECTION 5 – WORK FORCE ANALYSIS

- Required of Prime and Subconsultants
- California work force only
- 50 or more employees: use chart provided
- Less than 50 employees: exemption statement

Work Force Analysis

	Caucasian	African American	Hispanic	Asian/ Pacific Islander	Native American/ Native	Total Calif. Work Force
	M F	M F	M F	M F	M F	M F
Executives/Managers						
Licensed Professional Engineers/Surveyors/Architects						
Other Technical Professional						
Office/Clerical						
TOTAL						
PERCENT OF TOTAL						

SECTION 6 – NONDISCRIMINATION PLANS

- Required of Prime, Subconsultants and Vendors
- 50 or more employees provide plan
- Less than 50 employees: exemption statement



SECTION 7 – CALIFORNIA CIVIL RIGHTS LAWS

- Required of Prime
- Available on DPAC web site

STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION CALIFORNIA CIVIL RIGHTS LAWS CERTIFICATION ADM-0076 (NEW 01/2019)		ATTACHMENT _____ IFB Number _____
CALIFORNIA CIVIL RIGHTS LAWS CERTIFICATION		
Instructions: Complete as applicable, and submit with bid, proposal, contract, or amendment when the total contract value is one hundred thousand dollars (\$100,000) or more.		
Pursuant to Public Contract Code section 2010, if a bidder or proposer executes, renews, or amends a contract one hundred thousand dollars (\$100,000) or more on or after January 1, 2017, the bidder or proposer hereby certifies, under the penalty of perjury, compliance with the following:		
1. CALIFORNIA CIVIL RIGHTS LAWS: For contracts one hundred thousand dollars (\$100,000) or more executed, renewed, or amended after January 1, 2017, the contractor certifies compliance with the Unruh Civil Rights Act (Section 51 of the Civil Code) and the Fair Employment and Housing Act (Section 12960 of the Government Code); and		
2. EMPLOYER DISCRIMINATORY POLICIES: For contracts one hundred thousand dollars (\$100,000) or more executed, renewed, or amended after January 1, 2017, if a Contractor has an internal policy against a sovereign nation or peoples recognized by the United States government, the Contractor certifies that such policies are not used in violation of the Unruh Civil Rights Act (Section 51 of the Civil Code) or the Fair Employment and Housing Act (Section 12960 of the Government Code).		
CERTIFICATION		
I, the official named below, certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.		FEDERAL ID NUMBER (OR N/A)
PROPOSER/BIDDER FIRM NAME (PRINTED)		
BY (AUTHORIZED SIGNATURE)		
PRINTED NAME AND TITLE OF PERSON SIGNING		
DATE EXECUTED/SIGNED	EXECUTED/SIGNED IN THE COUNTY AND STATE OF	



QUESTIONS

Section 2

THE REPORT CARD



SOQ INITIAL
EVALUATION FORMS

ADM-2027A – SOQ INITIAL EVALUATION

STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION
ARCHITECTURAL AND ENGINEERING (A&E) CONSULTANT EVALUATION FORM
INITIAL EVALUATION

ADM-2027A (NEW 04/2020)

Page 1 of 2

Contract No. _____ Consultant _____

This scoring system is provided as a guideline for evaluating Statements of Qualifications (SOQs) that are submitted in response to a Request for Qualifications (RFQ) and for evaluating consultant proposals. Scores should be based only on the information provided in the SOQs.

Criteria	(a) Weight	(b) Score (0-10)	(a) x (b) Weighted Score
1. Experience of the Consultant Contract Manager and availability.	2		
2. Composition of the proposed team (professional and technical level personnel of the prime and subconsultants) to fulfill the requirements of the Scope of Work in the Request for Qualifications, including conflict and availability.	3		
3. Education, experience, and licensing of the key personnel to be assigned.	2		
4. Nature of completed relevant projects. <ul style="list-style-type: none"> All relevant experience should include state, federal and local projects (Caltrans projects will not be given a higher rate). 	1		
5. Past Performance Data. <ul style="list-style-type: none"> Caltrans Consultant Performance Evaluation Report, ADM-2031 Series, and additional reference checks by Caltrans staff may be used if available. 	2		
		Total	

Comments (continue on reverse if necessary)

STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION
ARCHITECTURAL AND ENGINEERING (A&E) CONSULTANT EVALUATION FORM
INITIAL EVALUATION

ADM-2027A (NEW 04/2020)

Page 2 of 2

SUGGESTED SCORING SYSTEM
FOR
A&E CALTRANS CONSULTANT SELECTION COMMITTEES

TIER	DESCRIPTION	SCORE
Excellent	<ul style="list-style-type: none"> Proposer has exceptional qualifications. SOQ supports an extremely strong expectation of successful Project performance. SOQ indicates significant strengths with few minor weaknesses, if any. SOQ contains an outstanding level of quality. 	10
Very Good	<ul style="list-style-type: none"> Proposer has strong qualifications. SOQ supports a very good expectation of successful Project performance. SOQ contains a few minor weaknesses that are outweighed by the strengths. Weaknesses, if any, are very minor and can be readily corrected. 	9
Good	<ul style="list-style-type: none"> Proposer has adequate qualifications. SOQ supports a good expectation of successful Project performance. SOQ contains strengths that are balanced by weaknesses. Weaknesses are minor and can be corrected. 	8
Fair	<ul style="list-style-type: none"> Proposer has limited qualifications. SOQ supports a fair expectation of successful Project performance. There are a significant number of weaknesses and very few strengths. Weaknesses could adversely affect successful project performance. 	7
Poor	<ul style="list-style-type: none"> Proposer has little or no qualifications. SOQ supports a weak expectation of successful Project performance. SOQ contains significant weaknesses with very minor strengths, if any. 	0 - 6

ADM-2027B – STRENGTHS AND WEAKNESSES

STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

ARCHITECTURAL AND ENGINEERING (A&E) CONSULTANT EVALUATION FORM

INITIAL EVALUATION - STRENGTHS AND WEAKNESSES

ADM-2027B (NEW 08/2020)

Contract No. _____ Consultant _____

Selection Committee members will determine strengths and weaknesses of each Statement of Qualifications (SOQ). Below is a list of the required elements from the Request for Qualifications (RFQ) which should be used, if applicable, to assist in reviewing the SOQs.

1. Experience of the Consultant Contract Manager

	Strengths and Associated SOQ Reference Section #	Weaknesses and Associated SOQ Reference Section #	Qualitative Rating Score (0 – 10)*
• Years of experience			
• Similar projects			
• Required License and Certifications			
• Must have contract management experience			
• Must be prime's employee			
• Availability			

ADM-2027B – STRENGTHS AND WEAKNESSES

STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

ARCHITECTURAL AND ENGINEERING (A&E) CONSULTANT EVALUATION FORM

INITIAL EVALUATION - STRENGTHS AND WEAKNESSES

ADM-2027B (NEW 08/2020)

Contract No. _____ Consultant _____

2. Composition of the Proposed Team

	Strengths and Associated SOQ Reference Section #	Weaknesses and Associated SOQ Reference Section #	Qualitative Rating Score (0 – 10)*
• Professional and technical level of personnel			
• Conflict of Interest			
• Availability			
• Proposed organizational chart covers all services in SOW			

ADM-2027B – STRENGTHS AND WEAKNESSES

STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

ARCHITECTURAL AND ENGINEERING (A&E) CONSULTANT EVALUATION FORM INITIAL EVALUATION - STRENGTHS AND WEAKNESSES

ADM-2027B (NEW 08/2020)

Contract No. _____ Consultant _____

3. Education, Experience, and Licensing of the Key Personnel to be Assigned

	Strengths and Associated SOQ Reference Section #	Weaknesses and Associated SOQ Reference Section #	Qualitative Rating Score (0 – 10)*
• Education in field of work			
• Similar projects			
• Years of experience			
• Required License and Certificates			
• Specialized experience			

ADM-2027B – STRENGTHS AND WEAKNESSES

STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

ARCHITECTURAL AND ENGINEERING (A&E) CONSULTANT EVALUATION FORM

INITIAL EVALUATION - STRENGTHS AND WEAKNESSES

ADM-2027B (NEW 08/2020)

Contract No. _____ Consultant _____

4. Nature of Completed Relevant Projects

	Strengths and Associated SOQ Reference Section #	Weaknesses and Associated SOQ Reference Section #	Qualitative Rating Score (0 – 10)*
<ul style="list-style-type: none">• All relevant experience including State, Federal and Local projects• Caltrans projects should not be given a higher score			

ADM-2027B – STRENGTHS AND WEAKNESSES

STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

ARCHITECTURAL AND ENGINEERING (A&E) CONSULTANT EVALUATION FORM INITIAL EVALUATION - STRENGTHS AND WEAKNESSES

ADM-2027B (NEW 08/2020)

Contract No. _____ Consultant _____

5. Past Performance Data

	Strengths and Associated SOQ Reference Section #	Weaknesses and Associated SOQ Reference Section #	Qualitative Rating Score (0 – 10)*
• Caltrans past performance evaluations (ADM-2031)			



SUMMARY

- Understand the Ask
- Be thorough and compliant in your Answer
- Grade yourself



THANK YOU!



QUESTIONS

Section 3

GLOSSARY OF ACRONYMS AND ABBREVIATIONS

- A&E Architecture & Engineering
- DBE Disadvantaged Business Enterprise
- DIR Department of Industrial Relations
- DPAC Division of Procurement and Contracts
- DQ Disqualified
- GFE Good Faith Effort
- NAICS North American Industry Classification System
- RFI Request for Information
- RFQ Request for Qualifications
- SAM System for Award Management
- SOQ Statement of Qualifications
- WBS Work Breakdown Structure

LIST OF WEB SITES

CALTRANS SITE LINKS

- Procuring A&E Contracts: <https://dot.ca.gov/programs/procurement-and-contracts/ae-contract-information/procuring-a-e-contracts>
- A&E Contract Information: <https://dot.ca.gov/programs/procurement-and-contracts/ae-contract-information>
- Advertisements: <https://dot.ca.gov/programs/procurement-and-contracts/ae-contract-information/a-e-advertisements>
- NEW DBE Database: <https://caltrans.dbesystem.com/>
- OLD DBE Database: <https://dot.ca.gov/programs/civil-rights/dbe-search>
- Office of Civil Rights: <https://dot.ca.gov/programs/civil-rights>
- Public Information Requests: [https://caltrans.mycusthelp.com/webapp/_rs/\(S\(vq5kwt2injam0jx2j5xqrzoi\)\)/supporthome.aspx](https://caltrans.mycusthelp.com/webapp/_rs/(S(vq5kwt2injam0jx2j5xqrzoi))/supporthome.aspx)

EXTERNAL SITE LINKS

- Cal eProcure Search Page: <https://caleprocure.ca.gov/pages/Events-BS3/event-search.aspx>
- Department of Industrial Relations Registration Search Page: <https://cadir.secure.force.com/ContractorSearch>

PRESENTER CONTACT INFORMATION

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